THE OPERA MARKET OF THE TORONTO-HAMILTON-OSHAWA REGION

NOW AND THEN

Ontario Ministry of Tourism & Recreation
Tourism Branch
November 2002

Ontario

TAMS
Travel Activities & Motivation Survey

INTRODUCTION

During the fall of 1999 and the winter of 2000, MTR in partnership with tourism organizations across Canada conducted two household surveys to determine the travel behaviour and characteristics of Canadian and US residents (Travel Activities and Motivation Survey - TAMS). The Canadian survey consisted of 18,385 and the US of 28,397 telephone interviews.

Subsequently, the Ministry projected the 1999/2000 databases to the year 2026 using population projections from Statistics Canada and the US Bureau of Census.

This report presents a profile of the opera market in the Toronto-Hamilton-Oshawa (THO) area at the end of 1999 and some estimates on how this market will change in 2026[1].

TAMS collected data not only on Canadian residents' travel habits, but also on their habits at home when they are not travelling. A list of activities was presented and respondents were asked: "***I'd like to get an idea of the things you personally do for day-to-day recreation and entertainment when you are not travelling. In the past year or so,...did you participate frequently, occasionally, rarely or did not participate at all in the following activities***". Going to the opera was one of the activities on the list.

The total sample for the THO region is 3,651, while the sample of those THO residents who said that they go to the opera frequently or occasionally when they are at home is 325:

	Opera Goers	Total Sample
Toronto CMA	= 186	1,730
Hamilton CMA	= 79	1,004
Oshawa CMA	= 60	917
Total	= 325	3,651

Since the Toronto residents constitute 57% of the sample, the results presented in the following pages are heavily influenced by their behaviour.

[1] For details on the methodology as well as an overview of how the total US and Canadian markets will look like in 2026 please visit our web site at: www.tourism.gov.on.ca and click on the link entitled Travel Activities and Motivation Survey. The two reports are entitled "Aging the Canadian Market" and "Aging the US market".

EXECUTIVE SUMMARY

- A total of 415,000 residents of the Toronto-Hamilton-Oshawa (THO) region aged 18 years and over indicated that when they are at home they go to the opera on a frequent or occasional basis. That's almost 10% of the region's total population of 18 years and older.

- Of the 415,000 opera-goers, 87% resided in Toronto, 10% in Hamilton and 3% in Oshawa. This level of participation represents an incidence of participation a bit over 10% for Toronto, 8% for Hamilton and 6% for Oshawa, reflecting in a way the fact that most opera productions are carried out in Toronto.

- Restaurants, live theatre, ballet, music concerts, art galleries and museums are other cultural activities that the THO opera-goers engage in on a frequent basis while at home. As such, locating near these types of facilities may prove profitable to opera houses.

- The average THO opera-goer is 45 years of age (as opposed to 44 for other THO residents), lives in a household that is smaller in size and has fewer children under 18 years of age than that of other THO residents and is much more educated and richer than other THO residents.

- Given their income and education a higher proportion of THO opera-goers travels than other THO residents (89% vs. 79%).

- When they are on an overnight trip, THO opera-goers seek similar types of activities to do as when they are at home, e.g., they go to the theatre, dine in high quality restaurants, etc. Compared to other THO residents, opera-goers do not participate in children-oriented activities as much, mainly due to the fact that fewer of them have children living at home.

- THO opera-goers are avid readers of newspapers, both the weekend and weekday editions. They also read community newspapers and the travel section of weekend newspapers. Late shows such as movies, drama and late evening news are the shows most frequently watched on TV by THO opera-goers. However, the incidence of TV watching is not as high as that of newspapers readership.

- Almost half of the THO opera-goers belong to the CAA club and over a third of them belong to a sports or fitness club. As such, these clubs represent cost-efficient alternatives to TV for reaching THO's opera-goers.

- By the year 2026, the THO region is forecast to have 65% more residents aged 18 years or older than it did at the end of 1999. Those who would frequently or occasionally go to the opera while not travelling are expected to increase by 140%, while other THO residents are expected to increase by 57%. As such, both the absolute and relative size of the opera-goers will more than double.

- By the year 2026, the average age of THO opera-goers will increase by 26% to 57 years. Although in absolute terms the number of THO opera-goers with children less than 18 years of age will increase over the period under consideration by 26%, the proportion of the opera-goers households with children less than 18 years of age will decline from 29% in 1999 to 15% in 2026.

- In 2026, the activities that opera-goers will participate in at home and while on overnight trips will be of a less strenuous nature. As such, activities of a cultural/entertainment nature will increase in importance for this group, while outdoors and strenuous activities will decline.

PART 1: THE PRESENT

How big is this market? A total of 415,000 residents of the Toronto-Hamilton-Oshawa (THO) region aged 18 years and over indicated that when they are at home they go to the opera on a frequent or occasional basis. That's a bit less than 10% of the region's total population of 18 years and older.

Of the 415,000 opera-goers, 87% resided in Toronto, 10% in Hamilton and 3% in Oshawa. This level of participation represents an incidence of participation a bit over 10% for Toronto, 8% for Hamilton and 6% for Oshawa, reflecting in a way the fact that most opera productions are carried out in Toronto.

Table 1: Other Day-To-Day Activities Engaged in By THO's Opera-Goers

Other Activities Engaged In:	Frequently or Occasionally	Frequently
Live Theatre	91%	26%
Ballet	65%	14%
Music Concerts (Classical, Jazz and Rock)	76%	23%
Art Gallery or Art Show	69%	17%
Museum	68%	14%
Opera	100%	18%
Professional Sporting Events	49%	14%
Restaurants other than fast food	94%	54%

Table 1 shows other cultural activities that these THO opera-goers engage in while at home. The first column of the table shows the proportion of THO's opera-goers who participate in the activities of the left-hand column on a frequent or occasional basis, while the second column shows the proportion of opera-goers who participate in these activities on a frequent basis when not travelling. Going to live theatre productions and restaurants (other than fast food restaurants) are at the top of the opera-goers' complimentary activities, followed by music concerts and art gallery exhibits.

The table also shows that only 18% of the THO opera-goers go to the opera on a frequent basis when not travelling.

Frequency of travel and destinations visited: Over 89% of the THO opera-goers had taken an overnight trip anywhere in the world during the 2 years preceding the study compared to 71% for other THO residents.

Table 2 shows the places the THO opera-goers visited for leisure purposes:

Table 2: Places Visited while on Overnight Leisure Trips in Past 2 Years		
	THO Opera-Goers	Other THO Residents
Newfoundland	3%	1%
PEI	5%	2%
Nova Scotia	7%	5%
New Brunswick	6%	4%
Quebec	29%	15%
Ontario	41%	37%
Manitoba	3%	2%
Saskatchewan	2%	1%
Alberta	12%	4%
BC	16%	8%
California	12%	5%
Hawaii	5%	1%
Washington state	5%	1%
Las Vegas	5%	3%
Florida	16%	12%
New York state	20%	13%
Other US states	29%	19%
UK/Europe	24%	11%
Caribbean/Mexico	17%	12%
Other Countries	13%	8%

As can be seen in this table, opera-goers have a higher incidence of visitation to any destination than other THO residents. However, for some destinations the incidence of visitation is significantly higher than that of other THO residents. These destinations are: Quebec, Newfoundland, PEI, Alberta[2], BC[2], California, Hawaii, Washington state, and UK/Europe.

Experiences sought when travelling: When travelling, opera-goers reveal themselves to be quite different than other THO residents. Of the 19 travel experiences listed in the next table, 17 are sought out more by THO opera-goers than they are by other THO residents and two are sought less (Visit Casinos and Gamble and Participate in a Hobby or Sport).

The experiences where the THO opera-goers are significantly different than other THO residents are:

- Visit friends/relatives Who Live on other Cities/countries
- Experience Different Cultures and Ways of Life
- Visit Historic Sites and Important Places in History
- Experience the Good Life
- Experience City Life
- Experience Unspoiled Nature, and
- Participate in a Hands-on Learning Experience.

Cultural/entertainment activities participated in while on an overnight trip: As was the case with the travel experiences sought while on an overnight trip, THO opera-goers have a higher incidence of participation in all cultural and entertainment activities than other THO residents with the exception of

[2] 26% of THO's opera-goers enjoy some form of skiing when travelling

amusement and theme parks, casinos and professional ice hockey. This can be a function of pure preferences and/or the life-cycle stage they are in. For example, as we will see later on, compared to other THO residents, a smaller proportion of opera-goers have children less than 18 at home. As such, children-oriented activities will not be high on their list.

Table 3: Experiences Sought while on Overnight Leisure Trips in Past 2 Years		
	THO Opera Goers	Other THO Residents
Rest, Relax and Recuperate	72%	52%
Visit Friends/relatives who Live in Other Cities/countries	74%	46%
Spend Time with Family Away from Home	52%	40%
Intimacy and Romance	33%	22%
Experience Different Cultures and Ways of Life	48%	21%
Visit Historic Sites and Important Places in History	47%	27%
Spend Time with a Group of Good Friends	45%	35%
See Natural Wonders and Important natural Sites	47%	31%
Experience the Good Life (fine cuisine, good wine, being pampered)	35%	22%
Visit Casinos and Gamble	13%	16%
Visit a Popular/Trendy Place	16%	15%
Be Someplace that Feels Familiar and Safe	27%	21%
Experience Adventure and Excitement	28%	24%
Experience City Life (shopping, museums, nightlife)	34%	22%
Escape the Winter Weather	33%	22%
Experience Unspoiled Nature	36%	23%
Participate in a Hobby or Sport (e.g., golf, fishing)	21%	22%
Participate in a hands-on Learning Experience (e.g., archaeological digs, cooking courses)	13%	3%
Spiritual/Religious Experience	7%	5%

Cultural tourists in general, and THO opera-goers in particular, form one of the few market segments where the activities they participate in while at home are highly correlated to those they participate in when they travel. Namely, when THO opera-goers travel they like to dine in "interesting" restaurants, shop, go to the theatre, art galleries museums, classical concerts and of course to the opera.

At the bottom of the activities that THO opera-goers participate in while on an overnight trip are things such as amusement and theme parks, sporting events, horse races and some cultural activities such as film festivals, theatre festivals and literary festivals. Although low participation rates in "theatre festivals" while travelling may appear to contradict the fact that when at home opera-goers enjoy

going to the theatre, this may simply be a function of the fact that the places which opera-goers visited did not offer at that time any theatre festivals.

Table 4: Cultural/Entertainment Activities Participated in During Overnight Trips - Incidence of Participation 20% or Higher		
	THO Opera Goers	Other THO Residents
Restaurant dining - regional or local cuisine	73%	54%
Read for relaxation on trip	69%	46%
Shop/browse - bookstores or music stores	59%	41%
Shop/browse - clothing/shoes/jewellery stores	52%	44%
Natural wonders such as Niagara Falls	50%	36%
Shop/browse - local arts & crafts	49%	35%
Local outdoor cafes	49%	29%
Movies	49%	34%
Art galleries	46%	18%
Shop/browse - antiques	45%	27%
Theatre	45%	22%
Restaurant dining - internationally acclaimed	44%	18%
General history museums	43%	20%
Farmers' fairs or markets	40%	24%
Concerts - classical	34%	5%
Science/technology museums	32%	15%
Shop/browse - retail gourmet foods	31%	19%
Botanical gardens	29%	13%
Zoos	28%	21%
Local festivals or fairs	27%	19%
Opera	27%	2%
Historic sites such as the Acropolis, Fort Alamo	27%	12%
Garden attractions such as Cypress Gardens	23%	7%
French Canadian cultural experience	23%	8%
Ballet or other dance performances	22%	6%
Pick-your-own farms or participate in harvesting	22%	13%
Historical replicas of towns with re-enactment	21%	9%
Casinos	20%	22%
Prof'l baseball - spectator	20%	14%

How does one reach them? THO opera-goers are avid readers of newspapers, both weekend and weekday editions. They also read community newspapers and the travel section of weekend newspapers. Late shows such as movies, drama and late evening news are the shows most frequently watched on TV by THO opera-goers.

However, the incidence of TV watching is not as high as that of newspapers readership.

Table 5: Cultural/Entertainment Activities Participated in During Overnight Trips Incidence of Participation Lower than 20%		
	THO Opera Goers	Other THO Residents
Aquariums	18%	12%
Recreational dancing	17%	14%
Concerts - jazz	14%	6%
Theatre festivals	14%	8%
Concerts - rock & roll/popular	13%	13%
Amateur sports/arts/hobby tournaments or competitions as spectator or participant	12%	9%
Musical festivals such as the Jazz festival in Montreal	11%	5%
Carnivals such as Mardi Gras or Rio's de Janeiro's Carnival	10%	4%
Prof'l ice hockey - spectator	10%	12%
Amusement parks like Disneyland	10%	14%
Horse races	10%	6%
Planetariums	7%	5%
Aboriginal attractions such as the Indian Museum of North America	7%	2%
Auto races - spectator	7%	5%
Science/technology theme parks like Epcot	7%	8%
Overnight Aboriginal cultural experience in a remote area	7%	3%
International film festivals	6%	5%
Children's museums	6%	6%
Pow Wow/aboriginal celebration	6%	2%
Prof'l basketball - spectator	6%	6%
Movie theme parks like MGM studios	6%	11%
National/international sports events such as the Olympics	6%	1%
Prof'l golf tournaments - spectator	5%	1%
Prof'l football - spectator	4%	4%
Literary festivals/events	4%	3%
Prof'l figure skating - spectator	3%	1%
Western theme events such as the Calgary Stampede or rodeos	2%	1%
Musical attractions such as Jazzland	0%	3%

Almost half of the THO opera-goers belong to the CAA club and over a third of them belong to a sports or fitness club. As such, these clubs represent cost-efficient alternatives to TV for reaching THO's opera-goers.

Table 6: TV Shows Watched Regularly by THO Opera-Goers	
Morning news shows	29%
Early evening news shows	55%
Late evening news shows	58%
News magazine shows	54%
Daytime TV during weekdays, such as talk shows and soap operas	16%
Professional sports events, such as golf, football, hockey, baseball or basketball	47%
Nature shows	56%
Instructional/hobby shows, such as gardening, fishing, woodworking, cooking	49%
Movies on TV	71%
Evening sitcoms	54%
Evening drama	61%
Other TV programs	46%

Table 7: Publications Read Regularly by THO Opera-Goers	
Daily newspaper	87%
Weekend newspaper	85%
Community newspapers	69%
Weekend newspaper - travel section	68%
Daily newspaper - travel section	58%
Other newspaper	36%
Travel magazines, such as National Geographic Traveller, Travel & Leisure, Conde Nast	34%
Canadian/National Geographic	44%
Sports magazines, such as Sports Illustrated, Golf Magazine, Sail	23%
Hobby magazines, such as Gourmet, Food & Wine, Gardening	38%
News magazines, such as Macleans, Time or Newsweek	57%
Fashion magazines, such as Chatelaine, Vogue, Women's Day	46%
General interest magazine, such as New Yorker, Harper's	40%
Other magazines	49%

Level of education completed: THO opera-goers have a significantly higher level of education than that of other THO residents - a bit over 50% of the THO opera-goers have completed university, compared to 27% for other THO residents.

Household income: THO opera-goers are also richer than other THO residents, perhaps a consequence of their higher education. On a pro-rated basis (i.e., excluding respondents' who did not know their household income or refused to reveal it), 56% of the opera-goers have a household income of $60,000 and over,

Table 11: Household Income			oers
	THO Opera Goers	Other THO Residents	48%
Under $20,000	5%	11%	9%
$20K to < $40K	19%	20%	14%
$40K to < $60K	15%	17%	7%
$60K to < $80K	9%	12%	36%
$80K to < $100K	9%	8%	3%
$100,000 +	31%	10%	34%
DK/Refuse	12%	23%	22%

while only 38% of the other THO residents have a household income that falls in that range.

Gender: THO opera-goers are a bit more dominated by females than the rest of the THO residents.

Table 10: Gender - THO

Table 13: Number of People in Household

	THO Opera Goers	Other THO Residents
1 Member	16%	11%
2 Members	29%	30%
3 Members	22%	21%
4 Members	21%	24%
5 Members	11%	10%
6+ Members	2%	4%

Age: As can be seen in the Table 12, there is not much difference in the age distribution of opera-goers and other THO residents. The average age of a THO opera-goer is 45 years, while that of other THO residents is 44 years.

The THO opera-goers have a slightly higher incidence of 18-20 year olds and 41-60 year olds, while the other THO residents have a higher incidence in the remaining age group categories.

In what type of

Table 9: Level of Education Completed by THO Opera-Goers

	THO Opera Goers	Other THO Residents
None	0%	0%
Elementary	0%	5%
Some secondary	4%	11%
Completed secondary/technical school	20%	26%
Some post-secondary education	1%	1%
Some trade-vocational	0%	1%
Trade-vocational diploma/certificate	2%	2%
Some college/CEGEP	3%	5%
Diploma of college/ CEGEP/nursing school	11%	16%
Some university	9%	6%
University diploma, level not specified	7%	5%
Bachelor's degree	25%	15%
University diploma above bachelor's but below master's	3%	2%
Master's degree	11%	4%
Degree in medicine, dentistry, veterinary	2%	0%
Earned Ph.D.	2%	1%
Other	0%	0%
Professional designation	0%	0%
DK/Refuse	0%	2%

households do they live in? THO opera-goers live in households that are slightly smaller in size than those of other THO residents - 67% of the opera-goers live in households of one, two or three members, while the corresponding figure for other THO residents is 62%.

They also live in households that have fewer children aged 17 years or younger - 29% of opera-goers live in households with children younger than 18, while 39% of other THO residents live in such households.

Over 80% of the THO opera-goers work at a job or business, compared to 66% for other THO residents, and have a higher incidence of two-income household than other THO residents - 41% of the opera-goers live in households where both spouses/partners work, as opposed to 32% for other THO residents.

Table 15: Two-Income Households

	THO Opera Goers	Other THO Residents
Yes	41%	32%
No	8%	9%

21-25 Years	6%	9%
26-30 Years	10%	11%
31-35 Years	8%	11%
36-40 Years	11%	14%
41-45 Years	11%	10%
46-50 Years	13%	9%
51-55 Years	10%	6%
56-60 Years	8%	7%
61-65 Years	5%	5%
66-70 Years	3%	4%
71-75 Years	3%	4%
76-80 Years	4%	3%
81and over	1%	2%

Country of Birth: THO opera-goers have the same proportion of Canadian-born members as other THO residents. However, there are some differences between the members of the two groups when it comes to THO residents who were born outside Canada. Opera-goers have a higher proportion of members who were born in Central/Eastern Europe and the United States and a lower proportion of members who were born in Southern Europe, Other Asia and Caribbean/Central America.

Table 14: Household Members under 18

	THO Opera Goers	Other THO Residents
1 Member	13%	17%
2 Members	14%	15%
3 Members	1%	6%
4+ Members	1%	1%

Table 16: Country of Birth

	THO Opera Goers	Other THO Residents

Canada	51%	52%
U.K./Western & Northern Europe/Germany	8%	7%
Southern Europe	5%	8%
Central/Eastern Europe	9%	4%
United States	4%	1%
East Asia	10%	9%
Other Asia	4%	7%
Middle East	2%	1%
Caribbean/Central America	2%	5%
Africa	3%	2%
South America	2%	3%
Other country	1%	1%

PART 2: THE FUTURE

By the year 2026, the THO region is forecast to have 65% more residents aged 18 years or older than it did at the end of 1999. Those who would frequently or occasionally go to the opera while not travelling are expected to increase by 140%, while other THO residents are expected to increase by 57%. As such, both the absolute and relative size of the opera-goers will more than double.

Table 17: THO Population in 2026 Residents Aged 18 Years or Older

Group\Year	1999	2026	Rate of Change
THO Opera-goers	414,905	996,682	140%
Other THO residents	3,927,237	6,152,084	57%

Table 18: Activities Participated in At Home on a Frequent Basis by THO Opera-Goers

	1999	2026	Rate of Change
Go to a park for a picnic/day outing	105,391	241,779	129%
Gardening	153,063	405,371	165%
Fishing	25,043	46,401	85%
Hunting	811	1,006	24%
Camping/hiking/backpacking	70,844	108,798	54%
Canoeing/kayaking	28,694	59,651	108%
Sailing/other boating	32,578	67,676	108%
Biking	106,322	138,664	30%
Cross-country skiing	26,650	39,264	47%
Downhill skiing/snowboarding	44,414	70,060	58%
Snowmobiling	9,416	9,100	-3%
Ice-skating	60,544	66,452	10%
Golf	79,067	138,519	75%
Play racquet sports such as tennis	41,625	97,570	134%
Play team sports such as football	53,678	99,716	86%
Exercise at home/fitness centre	216,798	455,564	110%
Swim in pools/natural bodies of water	127,572	249,533	96%
Dancing	64,025	157,315	146%
Dine in restaurants (no fast food)	222,446	564,838	154%
Gamble at casinos	12,069	18,446	53%
Visit amusement or theme parks	23,303	42,450	82%
Go to professional sports events	58,542	109,159	86%
Go to a zoo or botanical garden	36,059	87,997	144%
Go to live theatre	105,894	287,391	171%
Go to the ballet	56,961	187,488	229%
Go to the opera	76,108	244,576	221%
Go to music concerts (all types)	94,849	251,452	165%
Go to an art gallery or art show	72,585	193,116	166%
Go to a museum	58,856	167,520	185%
Stay at a hotel/B&B in your own town	17,828	21,326	20%

As Table 18 shows, all other activities that the THO opera-goers would engage in on a frequent basis while at home will increase, with the exception of snowmobiling. However, participation on a frequent basis in strenuous, outdoor or children's oriented activities is expected to increase at much lower rates than less strenuous or cultural activities.

Compared to 1999, in 2026 more THO opera-goers will be visiting each and everyone of the destinations listed in Table 19 in 2026. However, in relative terms their interest in the Atlantic Provinces, Alberta, California, Las Vegas and New York State, as destinations for overnight leisure trips will decline in 2026. On

the other hand, interest in places such as Quebec, Ontario, Saskatchewan, BC, Hawaii, Washington state, Florida, UK/Europe and "other" countries will increase[3].

Table 19: Places Visited for Overnight Leisure trips by THO Opera-Goers			
	1999	2026	Rate of Change
Newfoundland	13,541	19,885	47%
PEI	20,912	38,850	86%
Nova Scotia	30,631	54,788	79%
New Brunswick	26,070	46,731	79%
Quebec	120,706	309,397	156%
Ontario	169,654	434,516	156%
Manitoba	10,644	26,201	146%
Saskatchewan	9,119	23,924	162%
Alberta	49,917	108,792	118%
BC	64,499	218,556	239%
California	49,834	107,351	115%
Hawaii	19,261	54,357	182%
Washington state	22,547	70,060	211%
Las Vegas	20,251	39,240	94%
Florida	66,415	214,853	224%
New York state	81,461	171,083	110%
Other US states	118,854	287,499	142%
UK/Europe	100,759	278,598	176%
Caribbean/Mexico	68,525	150,853	120%
Other Countries	54,291	176,348	225%

[3] There are a number of reasons why some destinations become, in relative terms, more important to the opera-goers than others. Firstly, the relative rise and fall of destinations is related to the differential growth in the opera-goers' interests. For example, golfing, skiing and gambling do not grow as fast as the opera-goers' numbers. As such destinations such as Las Vegas, Alberta, and PEI and New Brunswick that offer gambling, skiing and golfing, respectively, decline in relative importance. Secondly, for destinations that are visited by only a few opera-goers, such as Saskatchewan, Manitoba and Hawaii, these results may just reflect their small sample size. As such caution is recommended in interpreting numbers related to small destinations. Finally, some destinations rise in importance because the cultural mix of the opera-goers would change. For example, while in 1999, 51% of the opera-goers were born in Canada, in 2026, this number will decline to 38%. Opera-goers born in Central/Eastern Europe would increase their size from 7%, in 1999 to 21% in 2026. As such, Europe would increase its relative importance as a destination for opera-goers as they travel back home to visit among other things, their friends and relatives.

Table 20: Age Group of THO Opera-Goers			
	1999	2026	Rate of Change
18-20 Years	30,594	36,398	19%
21-25 Years	23,350	31,441	35%
26-30 Years	39,899	43,461	9%
31-35 Years	31,490	41,459	32%
36-40 Years	45,524	62,720	38%
41-45 Years	45,706	56,354	23%
46-50 Years	55,011	80,605	47%
51-55 Years	43,415	109,542	152%
56-60 Years	32,850	118,436	261%
61-65 Years	21,012	74,605	255%
66-70 Years	12,984	48,216	271%
71-75 Years	12,468	86,987	598%
76-80 Years	16,571	154,242	831%
81and over	4,031	52,217	1,195%

The average age of the THO opera-goers will increase by 26% from 45 years in 1999 to 57 years in 2026. The proportion of those aged 51 years and over will increase substantially compared to 1999.

Although in absolute terms the number of THO opera-goers with children less than 18 years of age will increase over the period under consideration by 26%, the proportion of opera-goers households with children less than 18 years of age will decline from 29% in 1999 to 15% in 2026.

All types of travel experiences sought by THO opera-goers when on overnight trips will increase in 2026. However, some of them will increase by more than the growth of opera-goers and therefore their market share within this group would increase. These experiences are:

- Participate in a hands-on Learning Experience (archaeological digs, cooking)
- Visit Historic Sites and Important Places in History
- Visit Casinos and Gamble
- Be Someplace that Feels Familiar and Safe, and
- Spiritual/religious Experience

Table 21: THO Opera-Goers Households with Members Under 18		
# of Members under 18	1999	2026
1 Member	13%	7%
2 Members	14%	7%
3 Members	1%	1%
4+ Members	1%	0%

Similarly, while all cultural/entertainment activities that opera-goers participate in while on an overnight trip will increase in 2026, some activities will increase by more than the growth of this market segment and therefore their market share within opera-goers will increase. The top 20 of these activities are (in rank order):

1. Go to the ballet or other dance performance
2. Visit garden attractions
3. Go to a theatre festival
4. Visit amusement parks
5. Go to an international/national sporting event
6. Attend professional figure skating
7. Attend carnivals
8. Visit pick-your-own farms or participate in harvesting

9. Visit art galleries
10. Go to the opera
11. Go to a professional football game
12. Go to the horse races
13. Go to literary festivals or events
14. Visit general history museums
15. Attend classical concerts
16. Visit local festivals or fairs
17. Visit botanical gardens
18. Attend western theme events or rodeos
19. Go to a casino
20. Visit historic sites

Most of the outdoor activities that opera-goers participate in while on an overnight trip would increase by less than the growth of their numbers. The outdoor activities would increase in 2026 by more than the growth of THO opera-goers are (in rank order):

1. Motorcycle touring - day trip
2. Motorcycle touring - overnight trip
3. Fishing in salt water
4. Ice fishing
5. Fishing in fresh water
6. Go to picnics in park settings
7. Go for wildflowers/flora viewing
8. Other wildlife viewing

Table 22: Experiences Sought while on Overnight Leisure Trips

	1999	2026	Rate of Change
Rest, Relax and Recuperate	264,941	606,769	129%
Visit Friends/relatives who Live in Other Cities/countries	192,252	449,443	134%
Spend Time with Family Away from Home	274,908	643,648	134%
Intimacy and Romance	121,840	245,021	101%
Experience Different Cultures and Ways of Life	177,456	425,655	140%
Visit Historic Sites and Important Places in History	175,527	444,824	153%
Spend Time with a Group of Good Friends	167,480	365,087	118%
See Natural Wonders and Important natural Sites	173,529	416,309	140%
Experience the Good Life (fine cuisine, good wine, being pampered)	130,037	292,917	125%
Visit Casinos and Gamble	47,814	118,800	148%
Visit a Popular/Trendy Place	57,971	124,015	114%
Be Someplace that Feels Familiar and Safe	100,330	246,210	145%
Experience Adventure and Excitement	104,988	227,031	116%
Experience City Life (shopping, museums, nightlife)	125,130	296,727	137%
Escape the Winter Weather	123,281	282,920	129%
Experience Unspoiled Nature	132,176	285,097	116%
Participate in a Hobby or Sport (e.g., golf, fishing)	78,936	169,428	115%
Participate in a hands-on Learning Experience (e.g., archaeological digs, cooking courses)	47,732	141,321	196%
Spiritual/Religious Experience	24,773	60,762	145%

Table 23: Cultural/Entertainment Activities Participated in During Overnight Trips			
	1999	2026	Rate of Change
Restaurant dining - regional or local cuisine	268,846	586,809	118%
Read for relaxation on trip	256,982	547,473	113%
Shop/browse - bookstores or music stores	218,630	508,637	133%
Shop/browse - clothing/shoes/jewellery stores	193,179	432,069	124%
Natural wonders such as Niagara Falls	185,673	431,927	133%
Shop/browse - local arts & crafts	182,843	430,831	136%
Local outdoor cafes	182,736	412,076	126%
Movies	180,641	401,706	122%
Art galleries	170,942	456,926	167%
Shop/browse - antiques	167,202	375,735	125%
Theatre	164,749	390,398	137%
Restaurant dining - internationally acclaimed	161,164	348,561	116%
General history museums	157,555	405,486	157%
Farmers' fairs or markets	148,332	345,769	133%
Concerts - classical	127,473	327,457	157%
Science/technology museums	118,129	284,010	140%
Shop/browse - retail gourmet foods	115,748	224,241	94%
Botanical gardens	106,215	262,652	147%
Zoos	103,695	244,481	136%
Local festivals or fairs	101,330	256,997	154%
Opera	99,174	261,333	164%
Historic sites such as the Acropolis, Fort Alamo	98,531	240,070	144%
Garden attractions such as Cypress Gardens	84,457	245,270	190%
French Canadian cultural experience	83,983	173,185	106%
Ballet or other dance performances	82,462	246,971	199%
Pick-your-own farms or participate in harvesting	80,468	215,441	168%
Historical replicas of towns with re-enactment	76,563	184,338	141%
Casinos	75,064	183,475	144%
Prof'l baseball - spectator	73,835	162,607	120%

Table 24: Cultural/Entertainment Activities Participated in During Overnight Trips			
	1999	2026	Rate of Change
Aquariums	65,657	154,588	135%
Recreational dancing	63,587	144,036	127%
Concerts - jazz	52,303	123,094	135%
Theatre festivals	50,097	142,219	184%
Concerts - rock & roll/popular	46,267	80,926	75%
Amateur sports/arts/hobby tournaments or competitions as spectator or participant	42,965	90,897	112%
Musical festivals such as the Jazz festival in Montreal	39,516	83,987	113%
Carnivals such as Mardi Gras or Rio's de Janeiro's Carnival	37,139	100,383	170%
Prof'l ice hockey - spectator	36,356	67,475	86%
Amusement parks like Disneyland	36,242	98,361	171%
Horse races	35,720	93,621	162%
Planetariums	27,589	59,300	115%
Aboriginal attractions such as the Indian Museum of North America	27,025	56,146	108%
Auto races - spectator	26,567	60,679	128%
Science/technology theme parks like Epcot	25,954	57,852	123%
Overnight Aboriginal cultural experience in a remote area	25,844	47,829	85%
International film festivals	23,259	56,494	143%
Children's museums	22,530	54,455	142%
Pow Wow/aboriginal celebration	22,275	50,638	127%
Prof'l basketball - spectator	21,562	40,690	89%
Movie theme parks like MGM studios	20,692	43,061	108%
National/international sports events such as the Olympics	20,603	55,767	171%
Prof'l golf tournaments - spectator	16,674	31,129	87%
Prof'l football - spectator	14,751	38,991	164%
Literary festivals/events	14,553	37,980	161%
Prof'l figure skating - spectator	9,596	26,040	171%
Western theme events such as the Calgary Stampede or rodeos	8,382	20,563	145%
Musical attractions such as Jazzland	1,268	1,635	29%